



# USDA Weekly Retail Turkey Feature Activity

## Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/28 thru 12/04.

Fri. Nov 28, 2014

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>28.6% of 22,900 outlets</b>		<b>86.2% of 22,900 outlets</b>		<b>29.2% of 23,200 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>0.8%</b>		<b>6.8%</b>		<b>2.1%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>25,960</b>		<b>142,910</b>		<b>32,500</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens	3,850	1.40	21,600	1.67	4,850	1.64
" - Toms	3,850	1.40	21,300	1.65	4,850	1.64
Frozen - Hens	5,190	0.97	35,710	0.97	6,450	1.05
" - Toms	5,160	0.97	35,020	0.97	6,440	1.05
<b>PARTS:</b>						
<b>Breast:</b>						
<b>Bone-in, whole</b>						
Fresh	730	2.83	7,610	2.66	950	2.73
Frozen	3,720	1.81	13,800	1.82	2,850	1.79
<b>Split, bone-in</b>						
Fresh			110	2.49		
Rotisserie	310	7.19	3,540	8.72	1,120	7.98
<b>Boneless, whole</b>						
	40	4.99	20	6.21	10	4.54
<b>Cutlets</b>						
	370	5.55	10	4.99	250	4.99
<b>Cutlets, thin sliced</b>						
	40	4.99				
<b>Strips</b>						
<b>Tenders</b>						
Marinated Tenders	50	3.99	330	4.47	190	4.26
<b>Drumsticks</b>						
	20	1.79	700	2.26	20	1.52
<b>Thighs</b>						
	10	2.19				
<b>Wings</b>						
	10	1.39	300	2.17	20	1.42
<b>Necks</b>						
	10	1.39	190	1.80	10	1.55
<b>Smoked Drumsticks</b>						
			120	2.62	10	2.49
<b>Smoked Wings</b>						
	10	2.49	140	2.55	20	2.09
<b>Smoked Necks</b>						
	10	2.49	90	2.41	190	1.97
<b>GROUND TURKEY:</b>	<b>2,410</b>	<b>3.60</b>	<b>1,980</b>	<b>3.44</b>	<b>4,110</b>	<b>3.48</b>
<b>Patties</b>						
	10	3.99			750	3.15
<b>Sausage</b>						
	260	3.24	200	4.29	370	3.31
<b>85% lean</b>						
	130	2.91	510	2.85	330	2.68
<b>93% lean</b>						
	1,570	3.27	1,220	3.50	1,980	3.22
<b>Breast</b>						
	440	5.14	50	4.82	680	5.12
<b>Rolls (frsh/frz 1 lb.)</b>						
			40	2.94	30	2.79
<b>Specialty</b> <sup>5/</sup>						
<b>Patties</b>						
	10	4.99			10	3.99
<b>93-94% lean</b>						
	160	4.49	300	3.99	80	4.00
<b>Breast</b>						
					40	5.24

Note: rolls & specialty not included in ground turkey total and weighted average.

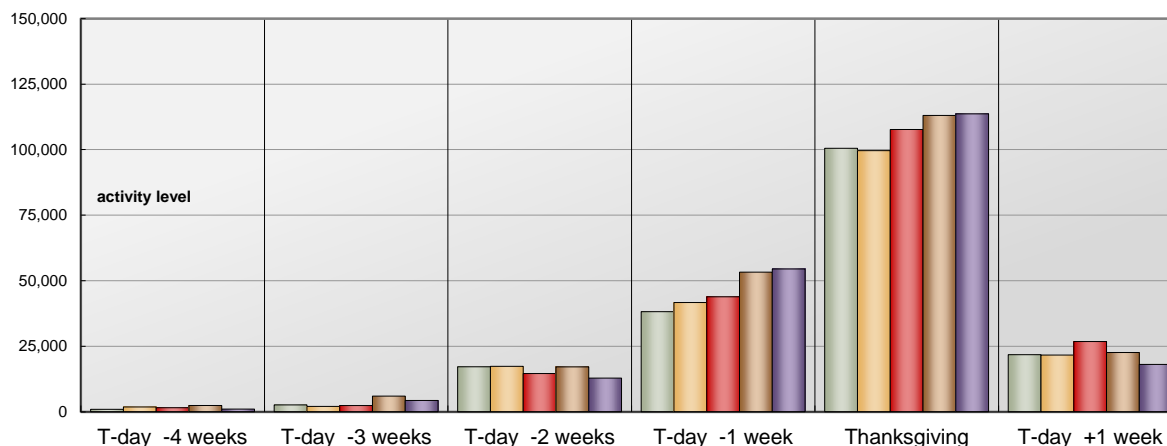
Source: USDA Agricultural Marketing Service, Livestock, Poultry & Seed Market News - (515) 284-4460 <http://www.ams.usda.gov/LPSMarketNewsPage>

### This Week's Turkey Feature Highlights

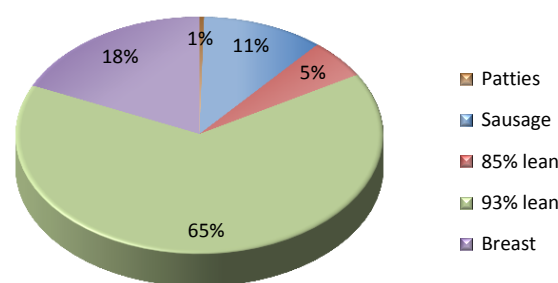
Retail feature activity slows midweek as anticipated. Thanksgiving holiday promotions fade from the circulars; it won't be long until the next holiday promotions start to appear. Offerings decline on fresh and frozen whole turkeys; prices are lower. Fewer stores offer fresh and frozen bone-in breasts; prices are higher on fresh, slightly lower on frozen. Featuring slows on rotisserie breasts. Offerings increase on cutlets, decline on marinated tenders. Feature activity slows on dark parts. This week retailers increased promotions on ground turkey, mostly 93% at lower prices. Deli feature activity is decreases on deli and self-service deli turkey and chicken.

### Whole Bird Activity Index during the Thanksgiving Season

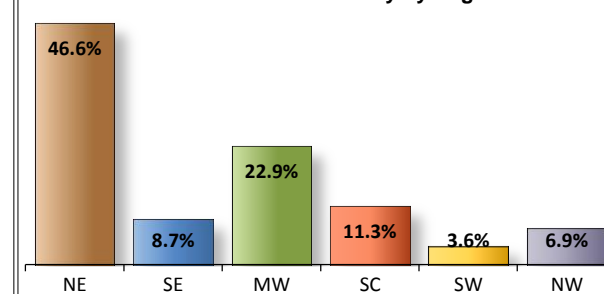
2010 2011 2012 2013 2014



### Ground Turkey Featuring by Type



### Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

**1/ Feature Rate:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Nov 28, 2014

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
<b>Special Rate</b> <sup>4/</sup>	<b>64.6% of 4,700 sampled outlets</b>			<b>18.0% of 5,900 sampled outlets</b>			<b>32.0% of 4,200 sampled outlets</b>		
<b>Activity Index</b> <sup>2/</sup>	<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>			<b>1.4% of stores w/ no-price promotions</b>		
	<b>Activity Index = 12,900</b>			<b>Activity Index = 3,300</b>			<b>Activity Index = 5,750</b>		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	0.59 - 1.99	1,900 1.19		0.99 - 1.99	300 1.69		0.98 - 1.99	1,090 1.44	
" - Toms	0.59 - 1.99	1,900 1.19		0.99 - 1.99	300 1.69		0.98 - 1.99	1,090 1.44	
Frozen - Hens	0.49 - 1.89	2,360 0.87		0.56 - 1.68	720 1.14		0.47 - 1.59	1,240 0.99	
" - Toms	0.49 - 1.89	2,360 0.87		0.79 - 1.68	690 1.17		0.47 - 1.59	1,240 0.99	
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.49 - 2.99	320 2.73		2.49 - 3.49	160 2.99		2.49 - 3.49	110 2.92	
Frozen	1.19 - 5.49	1,500 2.32		0.99 - 3.29	630 1.56		0.99 - 3.29	790 1.44	
Split, bone-in									
Fresh									
Rotisserie	6.99 - 8.99	190 7.11		6.99	40 6.99		6.99 - 9.99	80 7.47	
Boneless, whole	4.99	40 4.99							
Cutlets	4.79 - 5.99	330 5.56		5.49	40 5.49				
Cutlets, thin sliced	4.99	40 4.99							
Strips									
Tenders									
Marinated Tenders									
Drumsticks				1.79	10 1.79		1.39 - 2.19	10 1.79	
Thighs							2.19	10 2.19	
Wings							1.39	10 1.39	
Necks							1.39	10 1.39	
Smoked Drumsticks									
Smoked Wings				2.49	10 2.49				
Smoked Necks				2.49	10 2.49				
<b>GROUND TURKEY:</b>									
Patties	3.99	10 3.99							
Sausage	3.19 - 3.27	240 3.24		3.19	20 3.19				
85% lean				3.00	60 3.00		2.83	70 2.83	
93% lean	2.68 - 3.84	1,140 3.26		3.18 - 3.19	270 3.18				
Breast (99-100% lean)	4.59 - 5.38	400 5.16		4.99	40 4.99				
Rolls (frsh/frz 1 lb.)									
<b>Specialty</b> <sup>5/</sup>									
Patties	4.99	10 4.99							
93-94% lean	4.49	160 4.49							
Breast									



# USDA Weekly Retail Turkey Feature Activity

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Fri. Nov 28, 2014

	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	13.1% of 4,200 sampled outlets			10.0% of 2,800 sampled outlets			22.9% of 1,200 sampled outlets		
Special Rate <sup>4/</sup>	1.8% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			3.4% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 2,840			Activity Index = 650			Activity Index = 520		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.59 - 2.19	460	1.90	1.59 - 1.69	60	1.60	1.79	40	1.79
" - Toms	1.59 - 2.19	460	1.90	1.59 - 1.69	60	1.60	1.79	40	1.79
Frozen - Hens	0.59 - 1.49	560	1.09	0.69 - 1.29	190	1.12	0.59 - 1.49	120	1.09
" - Toms	0.59 - 1.49	560	1.09	0.69 - 1.29	190	1.12	0.59 - 1.49	120	1.09
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.79 - 2.99	140	2.80						
Frozen	1.19 - 1.99	530	1.42	1.19 - 2.29	130	1.24	1.19 - 1.98	140	1.49
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.99	30	3.99				3.99	20	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties									
Sausage									
85% lean									
93% lean	3.43 - 3.50	100	3.45	3.19 - 3.99	20	3.69	3.43	40	3.43
Breast (99-100% lean)									
Rolls (frsh/frz 1 lb.)									
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean									
Breast									



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/28 thru 12/04.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Nov 28, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate <sup>1/</sup>	27.4% of 22,900 stores		47.2% of 22,900 stores		25.5% of 23,200 stores		60.6% of 4,700 sampled outlets			23.5% of 5,900 sampled outlets		
Activity Index 2/	16,920		30,540		17,630		Activity Index = 9,440			Activity Index = 2,750		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	980	8.03	4,490	8.24	2,780	7.54	6.99 - 10.99	550	8.16			
Private Brand	1,140	7.85	1,670	8.08	1,810	7.29	3.99 - 7.99	1,060	7.80			
<b>Category 2</b>												
Processor Brand	2,300	6.43	3,450	6.13	1,190	5.83	4.99 - 7.99	1,170	6.70	4.99 - 7.99	280	5.90
Private Brand	1,190	7.69	3,320	7.18	1,250	5.96	4.99 - 8.99	810	7.70			
<b>Category 3</b>												
Processor Brand	320	4.11	370	4.06	270	4.04	3.99	200	3.99			
Private Brand	60	5.03	40	4.98	90	5.40	3.99 - 5.48	60	5.03			
<b>Turkey Ham</b>												
Processor Brand	230	3.99	90	5.54	110	3.73	3.29 - 5.99	100	3.90	3.29	40	3.29
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	250	4.55	60	4.13	160	4.24	3.99 - 8.99	250	4.55			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	1,690	8.24	1,370	8.15	1,510	7.25	6.99 - 9.99	950	8.73	6.99 - 7.99	40	7.39
Private Brand	860	6.99	950	7.97	710	7.09	6.99	860	6.99			
<b>Category 2</b>												
Processor Brand	70	5.51	40	4.78	110	4.84	5.99	20	5.99			
Private Brand			560	5.98	230	5.99						
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	3,390	3.45	3,630	3.57	2,100	3.01	2.50 - 3.99	1,330	3.57	2.00 - 4.00	1,130	3.64
Private Brand	650	3.26	2,310	2.98	1,180	2.77	2.99 - 3.50	570	3.27	2.99	40	2.99
<b>Turkey 16 oz</b>												
Processor Brand	450	5.92	1,380	5.26	1,110	4.63	5.99	160	5.99	5.99 - 6.49	50	6.09
Private Brand			1,070	4.50								
<b>Chicken 7-10 oz</b>												
Processor Brand	2,690	3.50	3,430	3.58	1,800	3.02	2.50 - 3.99	780	3.62	2.00 - 4.00	1,130	3.64
Private Brand	650	3.27	2,310	2.98	1,220	2.81	2.99 - 3.59	570	3.28	2.99	40	2.99

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 28, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/28 thru 12/04.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	23.3% of 4,200 sampled outlets			15.8% of 4,200 sampled outlets			6.3% of 2,800 sampled outlets			16.8% of 1,200 sampled outlets		
Activity Index <sup>2/</sup>	Activity Index = 3,540			Activity Index = 710			Activity Index = 210			Activity Index = 270		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6.99 - 9.99	390 7.84		6.49 - 7.99	30 7.73		9.49	10 9.49				
Private Brand					70 8.62		7.99	10 7.99				
<b>Category 2</b>												
Processor Brand	4.99 - 6.99	600 6.26		5.99 - 6.49	210 6.05					6.99	40 6.99	
Private Brand	6.49 - 6.99	30 6.66		6.99 - 8.49	160 7.74		8.49	40 8.49		7.49 - 8.49	150 7.59	
<b>Category 3</b>												
Processor Brand	3.99 - 4.59	30 4.16					3.77 - 4.97	90 4.37				
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	2.99	10 2.99		6.99	20 6.99		2.99 - 3.99	60 3.77				
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand												
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 8.98	680 7.59		8.49	20 8.49							
Private Brand												
<b>Category 2</b>												
Processor Brand	4.59 - 5.49	50 5.31										
Private Brand												
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 3.99	740 3.16		2.39 - 2.50	150 2.40					3.49	40 3.49	
Private Brand	3.00 - 3.49	40 3.36										
<b>Turkey 16 oz</b>												
Processor Brand	4.99 - 5.99	200 5.91		5.49	40 5.49							
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.00 - 3.99	730 3.17		2.50	10 2.50					3.49	40 3.49	
Private Brand	3.00 - 3.49	40 3.36										

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)